

## UNITED STATES HOUSE OF REPRESENTATIVES

## 2018 FINANCIAL DISCLOSURE STATEMENT

Form A  
For Use by Members, Officers, and EmployeesName: Bradley James Sherman

Daytime Telephone: \_\_\_\_\_

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>CA</u> District: <u>30</u>	Officer or Employee _____	Staff Filer Type: (If Applicable) Shared <input type="checkbox"/> Principal Assistant <input checked="" type="checkbox"/>
REPORT TYPE	<input checked="" type="checkbox"/> 2018 Annual (Due: May 15, 2019)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____

~~U.S. HOUSE OF REPRESENTATIVES~~  
A \$200 penalty shall be assessed against any individual who files more than 30 days late.

*McLaughlin 3rd May 44*

## PRELIMINARY INFORMATION – ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child:

a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period?  Yes  No

b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?

B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?

C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?

D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?

E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?

F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?

G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$390 in value from a single source during the reporting period?

H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$390 in value from a single source during the reporting period?

I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?

Yes  No

**ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"**

## IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.

TRUSTS – Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?

EXEMPTION – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

IPO – Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.

TRUSTS – Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?

EXEMPTION – Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.

# SCHEDULE A – ASSETS & “UNEARNED INCOME”

Name: Bradley James Sherman

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset												BLOCK C Type of Income												BLOCK D Amount of Income												BLOCK E Transaction											
Identify (a) each asset held for investment or production of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income that generated more than \$200 in “unearned” income during the year.		Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, please specify the method used.												Check all columns that apply. For accounts that generate tax-deferred income (such as 401(k), IRA, or 529 accounts), you may check the “None” column. For all other assets indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check “None” if the asset generated no income during the reporting period.												For assets for which you checked “Tax-Deferred” in Block C, you may check the “None” column. For all other assets indicate the sales (S), or sales (E) in the reporting period.																							
Provide complete names of stocks and mutual funds (do not use only ticker symbols).		If an asset was sold during the reporting period and is included only because it generated income, the value should be “None.”												If only a portion of an asset was sold, please indicate as follows: (S) (part), (P) (part), or (E) (part).																																			
For all IRAs and other retirement plans (such as 401(k) plans), provide the value for each asset held in the account that exceeds the reporting thresholds.		For bond and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.												For assets held in taxable accounts, Check “None” if no income was earned or generated.																																			
A	B	C	D	E	F	G	H	I	J	K	L	M	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII													
For rental and other real property held for investment, provide a complete address or description, e.g., “rental property,” and city and state.		For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.												For assets held in taxable accounts, Check “None” if no income was earned or generated.																																			
Excluded: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.		For rental and other real property held for investment, provide a complete address or description, e.g., “rental property,” and city and state.												For assets held in taxable accounts, Check “None” if no income was earned or generated.																																			
If you report a privately-held fund that is an Exempt Investment Fund, please check the “EIF” box.		For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.												For assets held in taxable accounts, Check “None” if no income was earned or generated.																																			
If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left.		For rental and other real property held for investment, provide a complete address or description, e.g., “rental property,” and city and state.												For assets held in taxable accounts, Check “None” if no income was earned or generated.																																			
For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.		For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.												For assets held in taxable accounts, Check “None” if no income was earned or generated.																																			
SP	SP	None												None												None																							
DC	DC	\$1-\$1,000												\$1-\$200												\$1-\$200																							
JT	JT	\$1,001-\$15,000												\$201-\$1,000												\$201-\$1,000																							
Example:		\$15,001-\$50,000												\$1,001-\$2,500												\$1,001-\$2,500																							
ABC Hedge Fund		\$50,001-\$100,000												\$2,501-\$5,000												\$2,501-\$5,000																							
Bank of America		\$100,001-\$250,000												\$5,001-\$15,000												\$5,001-\$15,000																							
X		\$250,001-\$500,000												\$15,001-\$50,000												\$15,001-\$50,000																							
X		\$500,001-\$1,000,000												\$50,001-\$100,000												\$50,001-\$100,000																							
X		\$1,000,001-\$5,000,000												\$100,001-\$1,000,000												\$100,001-\$1,000,000																							
X		Over \$50,000,000												Over \$5,000,000												Over \$5,000,000																							
X		Spouse/DC Asset over \$1,000,000*												Spouse/DC Asset with Income over \$1,000,000*												Spouse/DC Asset with Income over \$1,000,000*																							
X		None												None												None																							
X		DIVIDENDS												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		RENT												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		INTEREST												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		CAPITAL GAINS												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		EXCEPTED/BLIND TRUST												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		TAX-DEFERRED												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		Other Type of Income (Specify: e.g., Partnership Income or Farm Income)												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		None												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$1-\$1,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$1,001-\$15,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$15,001-\$50,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$50,001-\$100,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$100,001-\$250,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$250,001-\$500,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$500,001-\$1,000,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$1,000,001-\$5,000,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		Over \$50,000,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		Spouse/DC Asset over \$1,000,000*												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		None												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		DIVIDENDS												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		RENT												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		INTEREST												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		CAPITAL GAINS												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		EXCEPTED/BLIND TRUST												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		TAX-DEFERRED												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		Other Type of Income (Specify: e.g., Partnership Income or Farm Income)												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		None												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$1-\$200												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$201-\$1,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$1,001-\$2,500												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$2,501-\$5,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$5,001-\$15,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$15,001-\$50,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$50,001-\$100,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$100,001-\$1,000,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		\$1,000,001-\$5,000,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		Over \$5,000,000												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		Spouse/DC Asset with Income over \$1,000,000*												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
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X		None												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (P), purchases (P), sales (S), or exchanges (E) in the reporting period.																							
X		None												\$P, \$S, \$P(part), or E												Indicate if the asset held sales (																							

**SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: *Bradley James Sherman*

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Use additional sheets if more space is required.

BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset												BLOCK C Type of Income		BLOCK D Amount of Income												BLOCK E Transaction				
SP. ID. #	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P	S	S (part)	or E		
														None																		
														\$1-\$1,000																		
														\$1,001-\$15,000																		
														\$15,001-\$50,000																		
														\$50,001-\$100,000																		
														\$100,001-\$250,000																		
														\$250,001-\$500,000																		
														\$500,001-\$1,000,000																		
														\$1,000,001-\$5,000,000																		
														\$5,000,001-\$25,000,000																		
														\$25,000,001-\$50,000,000																		
														Over \$50,000,000																		
														Spouse/DC Asset over \$1,000,000*																		
														None																		
														NON																		
														DIVIDENDS																		
														RENT																		
														INTEREST																		
														CAPITAL GAINS																		
														EXCEPTED/BLIND TRUST																		
														TAX-DEFERRED																		
														Other Type of Income (Specify: e.g., Partnership Income or Farm Income)																		
														None																		
														\$1-\$200																		
														\$201-\$1,000																		
														\$1,001-\$2,500																		
														\$2,501-\$5,000																		
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														\$100,001-\$1,000,000																		
														\$1,000,001-\$5,000,000																		
														Over \$5,000,000																		
														Spouse/DC Asset with Income over \$1,000,000*																		
														P, S, S (part), or E																		

Bee Bee Draw  
Hambert Properties  
(small working  
interest in oil  
& gas wells in  
Weld County (CO))

valuation is a  
rough estimate  
royalties net of  
expenses

royalties

X

**SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: Bradley James Sherman

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BLOCK A Assets and/or Income Sources	BLOCK B Value of Asset	BLOCK C Type of Income	BLOCK D Amount of Income	BLOCK E Transaction																						
				A	B	C	D	E	F	G	H	I	J	K	L	M	I	II	III	IV	V	VI	VII	VIII	IX	X
Spouse/DC JT	ASSET NAME	EIF																								
CA State Legislators	X		None																							
Retirement pension from Service on CA			\$1-\$1,000																							
Board of Equalization			\$1,001-\$15,000																							
Value Estimated			\$15,001-\$50,000																							
Sacramento, CA			\$50,001-\$100,000																							
(income net of tax deductions)			\$100,001-\$1,000,000																							
			\$1,000,001-\$5,000,000																							
			\$5,000,001-\$50,000,000																							
			Over \$50,000,000																							
			Spouse/DC Asset over \$1,000,000*																							
			None																							
			DIVIDENDS																							
			RENT																							
			INTEREST																							
			CAPITAL GAINS																							
			EXCEPTED/BLIND TRUST																							
			TAX-DEFERRED																							
			Other Type of Income (Specify, e.g., Partnership Income or Farm Income)																							
			None																							
			\$1-\$200																							
			\$201-\$1,000																							
			\$1,001-\$2,500																							
			\$2,501-\$5,000																							
			\$5,001-\$15,000																							
			\$15,001-\$50,000																							
			\$50,001-\$100,000																							
			\$100,001-\$1,000,000																							
			\$1,000,001-\$5,000,000																							
			Over \$5,000,000																							
			Spouse/DC Asset with Income over \$1,000,000*																							
			P, S, S (part), or E																							

Use additional sheets if more space is required.

## **SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: Bradley James Sherman

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Use additional sheets if more space is required.

## **SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: Bradley James Sherman

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Use additional sheets if more space is required.

## **SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: Bradley James Sherman

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Use additional sheets if more space is required.

## **SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: Bradley James Sherman

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Use additional sheets if more space is required.

## **SCHEDULE A – ASSETS & “UNEARNED INCOME”**

Name: Bradley James Sherman

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Use additional sheets if more space is required.

## SCHEDULE B – TRANSACTIONS

Name: Bradley James Sherman

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

**Capital Gains:** If a state's transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

\* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JI	Asset
SP	Example
	Mega Corp. Stock

Use additional sheets if more space is required.



## SCHEDULE D – LIABILITIES

Name: Bradley James Sherman      Page 12 of 15

Report liabilities of over \$10,000 owed to any one creditor at any time during the reporting period. **Members:** Members are required to report all liabilities secured by real property including mortgages on their personal residence. **Exclude:** Any mortgage on your personal residence (unless you rent it out or own it); loans secured by automobiles, household furniture, or appliances; liabilities of a business in which you own an interest (unless you are personally liable); and liabilities owed to you by a spouse or the child, parent, or sibling of you or your spouse. Report a revolving charge account (i.e., credit card) only if the balance at the close of the reporting period exceeded \$10,000.

\*Column K is for liabilities held solely by your spouse or dependent child.

SP DC, JR	Creditor	Date Liability Incurred MO/YR	Type of Liability	Amount of Liability										
				A	B	C	D	E	F	G	H	I	J	K
Example	First Bank of Wilmington, DE	5/18	Mortgage on Rental Property, Dover, DE		\$10,001-\$15,000									
	Sandy Spring Bank (MD)	1/17	Home Equity line of credit Secured by Nash DC Home		\$15,001-\$50,000		\$50,001-\$100,000		\$100,001-\$250,000		\$250,001-\$500,000		\$500,001-\$1,000,000	
	Congressional Federal Credit Union	9/16	first mortgage on home in DC		X									
	Payburn Building													

## SCHEDULE E – POSITIONS

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. **Exclude:** Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization

**Schedule of Transactions**

## Vanguard TIPS Fund (Not IRA)

<b>Date</b>	<b>Transaction</b>	<b>Amount</b>
3/15/2018	Income Dividend Reinvested	\$477.39
6/15/2018	Income Dividend Reinvested	\$963.79
9/21/2018	Income Dividend Reinvested	\$1,196.49
12/18/2018	Income Dividend Reinvested	\$1,976.03
<b>Total</b>	<b>12/18/2018</b>	<b>\$4,613.70</b>
	Sale (Net Gain \$2,034.00)	\$20,000

## Vanguard TIPS Funds (IRA)

<b>Date</b>	<b>Transaction</b>	<b>Amount</b>
3/15/2018	Income Dividend Reinvested	\$431.96
06/15/2018	Income Dividend Reinvested	\$872.09
09/21/2018	Income Dividend Reinvested	\$1,082.65
12/18/2018	Income Dividend Reinvested	\$1,788.02
<b>Total</b>		<b>\$4,174.72</b>

## Vanguard CA Intermediate Tax Exempt Board Fund

Date	Transaction	Amount
01/31/2018	Income Dividend Reinvested	\$367.87
02/28/2018	Income Dividend Reinvested	\$331.27
03/29/2018	Income Dividend Reinvested	\$368.87
04/30/2018	Income Dividend Reinvested	\$358.55
05/31/2018	Income Dividend Reinvested	\$371.01
06/30/2018	Income Dividend Reinvested	\$359.48
07/31/2018	Income Dividend Reinvested	\$366.11
08/31/2018	Income Dividend Reinvested	\$364.80
09/28/2018	Income Dividend Reinvested	\$357.10
10/31/2018	Income Dividend Reinvested	\$370.81
11/30/2018	Income Dividend Reinvested	\$363.93
12/29/2018	Income Dividend Reinvested	\$380.07
Total	Income Dividend Reinvested	\$4,359.87

## Footnotes

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Number	Section/Schedule	Footnote
1	General Information	Filer owns a home in his district. Because that home is not subject to a mortgage, and does not produce rental income, it is not listed in this report.
2	General Information	We have been advised that the phrase "trust benefiting you" does not apply to a trust from which the filer receives no benefits, but which will provide a benefit at some future time upon the death of the current beneficiary (but only if the trust happens to still have assets at that time).
3	General Information	Disclosure not required by law or regulation: filer's campaign committee has made significant investments, including in US government bonds (TIPS). For details, see its FEC report.